

## Survey Tool Set up and Process Information

1. Complete the Survey Development Requirements for:
  - a. Original Setup
  - b. Changes to template
  - c. Person in agency who is authorized to request agency set up/changes to template
    - i. User info
      1. Names get on user list in order to receive release notes (email)
    - ii. Roles
    - iii. Templates
  - iv. Resources
    1. graphics
    2. training
2. Developing your survey
  - a. Considerations
    - i. Naming convention (survey and email templates)
  - b. Plan your survey
    - i. Example Surveys for training purposes (see URLs)
      1. Customer Satisfaction  
<http://services.georgia.gov:80/esp/survey.do?surveyId=2042>
      2. Example Survey <http://services.georgia.gov:80/esp/survey.do?surveyId=2048>
      3. Portal Interest <http://services.georgia.gov:80/esp/survey.do?surveyId=2036>
      4. Request Someone's Attendance at a meeting/function  
<http://services.georgia.gov:80/esp/survey.do?surveyId=2035>
    - ii. Helpful Hints  
[http://georgia.gov/00/channel\\_title/0,2094,4802\\_12695632,00.html](http://georgia.gov/00/channel_title/0,2094,4802_12695632,00.html)
    - iii. Questions
    - iv. Order
  - c. Create survey
  - d. Create email template
  - e. Test survey
  - f. Test email response
  - g. Test export features
  - h. Conduct QM testing
3. Implement your survey
  - a. Delete test results
  - b. Register your survey  
<http://services.georgia.gov:80/esp/survey.do?surveyId=2021>
  - c. Add link to your website
  - d. Send link to targeted respondents via email
  - e. Do periodic cleanup of surveys (due to archival)
4. Reinstate an archived survey
  - a. Complete a request (See URL – future development)
5. Support
  - a. Training questions
  - b. Problems with tool
  - c. Changes to user info or template